Symposium Recap & High Points to Remember

September 27, 2017

Craig Little, Interim Director, Alumni Societies and Regional Engagement
Brendan Braaten, Regional Engagement Officer: Southeast
Overview of Presentation:

• FY 17 Alumni Group Highlights
• Retreat Planning
• Event Resources
• Program Breakout Session Highlights
• Q & A
In year Two!

• $220,000 awarded in Incentive & Reward Funds
• Up $20,000 from last year
• Over 1,077 club and society events hosted in FY 17
• 43 co-sponsored OSUAA events, up from 31
• 143 websites maintained, up 10
• 475 emails sent on your behalf, up from 282
Buckeyes Give Back

Since 1980, The Ohio State University Alumni Association groups have been supporting Ohio State students through scholarships. Because of you, thousands of students have been able to experience life as a Buckeye. Take a look at all we’ve done together.

- **1980**: Clubs are inspired to create scholarships for new Buckeyes. In the first year, 49 groups support 86 scholarships totaling nearly $43,850.

- **1985**: Scholarships increase to 110 from 1985 to 86.

- **1990**: From 1990 to 91, a total of 127 scholarships is awarded from a combined $83,767.

- **1995**: Between 1995 and 1996, scholarship funds more than doubled in the previous five years to $175,335.

- **1997**: Societies’ scholarship awards begin to be tracked in the Ohio State database. They awarded to 45 students $24,965 in financial aid.

- **2000**: A combined 109 clubs and societies support 451 students with $361,038 in scholarships.

- **2005**: Societies celebrate their second year awarding $100k+ in scholarships.

- **2010**: A total of 125 clubs and societies around the country support student scholarships.

- **2015**: After 35 years, 145 clubs and societies now support 605 students through $923,998 in scholarships.

- **2017**: For the first time, clubs, groups and societies award more than $1 million in scholarships.
Symposium Awards

ALUMNI CLUB OF THE YEAR
JACKSONVILLE

ALUMNI SOCIETY OF THE YEAR
STADIUM SCHOLARSHIP

ALUMNI CLUB PROGRAMS OF THE YEAR
NC TRIANGLE: PACK SHACK
WASHINGTON, D.C.: HIDDEN FIGURES
SAN DIEGO: BEACH CLEAN-UP

ALUMNI SOCIETY PROGRAMS OF THE YEAR
STADIUM SCHOLARSHIP: CAPES FOR KIDS COMMUNITY SERVICE EVENT
RETIREEs: FALL CONFERENCE EVENT
NURSING: PROFESSIONALISM WEEK

ALUMNI CLUB INNOVATIVE PROGRAM OF THE YEAR
JACKSONVILLE: SPECIAL PLAY FOR GROWING BUCKEYES

ALUMNI SOCIETY INNOVATIVE PROGRAM OF THE YEAR
HSMP: MANAGEMENT INSTITUTE

PAY IT FORWARD – ALUMNI CLUBS
PATRICIA KELLY: AUSTIN
TERRY KOPCHAK: MUSKINGUM COUNTY
DEBBI LEWIS: SAN DIEGO
DENISE HERMAN MCCOLLEY: NORTHWEST OHIO
LEYLA HAWKINS: FRANKLIN COUNTY

PAY IT FORWARD – ALUMNI SOCIETIES
SHIRLEY FIELDS MCCOY: RETIREEs
MARK MORSCHER: EE / ECE
SUSAN REED: VETERINARY MEDICINE
CRAIG FRIEDMAN: ARTS AND SCIENCES
DAVID HIATT: ARMY ROTC

CARL(s) of the Year

LTC James Bunyak: ROTC

Colleen Pelasky: Nursing
AWARD WINNERS

OUTSTANDING ALUMNI CLUBS
- Alumni Club of Athens County, Ohio
- Alumni Club of Atlanta
- Austin Texas Alumni Club
- Bluegrass Alumni Club
- Alumni Club of Central Florida
- Alumni Club of Charleston, South Carolina
- Charlotte Buckeyes Alumni Club
- Alumni Club of Chicago
- Alumni Club of Cleveland
- Alumni Club of Columbiana
- Alumni Club of Dallas
- Alumni Club of Delaware County, Ohio
- Alumni Club of Denver
- Alumni Club of Detroit
- Alumni Club of Erie County, Ohio
- Alumni Club of Fayette County, Ohio
- Alumni Club of Franklin County, Ohio
- Alumni Club of Greater Cincinnati
- Alumni Club of Greater Jacksonville
- Alumni Club of Greater New Orleans
- Alumni Club of Greene County, Ohio
- Greenville Buckeyes Alumni Club
- Alumni Club of Hawaii
- Alumni Club of Houston
- Alumni Club of Knox County, Ohio
- Alumni Club of Los Angeles
- Alumni Club of Lucas County, Ohio
- Alumni Club of Mercer County, Ohio
- Alumni Club of Middle Tennessee
- Alumni Club of Minnesota
- Alumni Club of Muskingum County, Ohio
- Alumni Club of Naples
- Alumni Club of New Mexico
- Alumni Club of Northeast Ohio
- Alumni Club of New York Capital Region
- Alumni Club of Oklahoma
- Alumni Club of Orange County, California
- Alumni Club of Phoenix
- Alumni Club of Portland
- Alumni Club of Richland County, Ohio
- Alumni Club of Ross County, Ohio
- Alumni Club of the Sacramento Valley
- Alumni Club of San Antonio
- Alumni Club of San Diego
- Sarasota-Manatee Ohio State Alumni Club
- Alumni Club of Seattle
- Alumni Club of Shelby County, Ohio
- Alumni Club of Southern Arizona
- Alumni Club of Southwest Florida
- Alumni Club of St. Louis
- Austin Texas Alumni Club
- The Alumni Club of Treasure Coast, Florida
- Alumni Club of the Triangle-North Carolina
- Alumni Club of Tri-County Florida
- Alumni Club of Tuscarawas County, Ohio
- Alumni Club of Van Wert and Paulding Counties
- Alumni Club of Washington, D.C.
- Alumni Club of West Michigan
- Alumni Club of Wood County, Ohio

OUTSTANDING ALUMNI SOCIETIES
- Air Force ROTC Alumni Society
- Alumnae Scholarship Housing Alumni Society
- Army ROTC Alumni Society
- Aviation Alumni Society
- College of Arts and Sciences Alumni Society
- Black Alumni Society
- Cheerleaders Alumni Society
- Circle K Alumni Society
- Dance Team Alumni Society
- College of Dentistry Alumni Society
- College of Education and Human Ecology Alumni Society
- Electrical Engineering / Electrical Computer Engineering Alumni Society
- Environmental and Natural Resources Alumni Society
- College of Food, Agricultural and Environmental Sciences Alumni Society
- Health Services Management and Policy Alumni Society
- Honors and Scholars Alumni Society
- John Glenn College of Public Affairs Alumni Society
- Knowlton School Alumni Society
- College of Medicine Alumni Society
- Navy ROTC Alumni Society
- College of Nursing Alumni Society
- Ohio State University Retirees Association Alumni Society
- College of Pharmacy Alumni Society
- College of Public Health Alumni Society
- Rudi Emergency Medicine Alumni Society
- Scarlet and Gray; The Ohio State University LGBTQ Alumni Society
- College of Social Work Alumni Society
- Stadium Scholarship Alumni Society
- Varsity O Alumni Society
- College of Veterinary Medicine Alumni Society
- Welding Engineering Alumni Society
Special Welcome to our new groups:

- Asian & Pacific Islander Alumni Society
- Latinx Alumni Society
- Women in STEM Alumnae Society
- Alumni Club of Knoxville, TN
- Alumni Club of Northwest Arkansas
Regional Breakout Session
Retreat Planning

- Plan Retreat
- Set the Tone for Year
- Identify goals, challenges and resources to accomplish
- Energize board
- Secure Buy-In

Short-Term Goals
- Events
- Football Season
- Fundraising

Long-Term Goals
- Event Calendar for Year
- Membership Growth
- Succession Planning
**SWOT Analysis**

**STRENGTHS**
- What are some ways your group excels in this area?

**WEAKNESSES**
- What are some areas of growth for your group on this topic?

**OPPORTUNITIES**
- What elements could the group utilize to its advantage in this area?

**THREATS**
- What environmental factors cause trouble for the group?

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<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES</th>
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<tr>
<th>OPPORTUNITIES</th>
<th>THREATS</th>
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</table>
**Strengths**
- Well funded
- Large membership pool / potential
- Smart board

**Opportunities**
- Specified / energetic support from Athletics (Mitch and Maddy)
- Collaborate w/ other clubs / societies
- Create sport specific subgroups
- Strategic planning / retreat

**Weaknesses**
- FB tickets are primary motivation
- Need to delegate more w/l board and to athletics.
- No determined spending policy

**Threats**
- Administrative burdens from Alumni / Athletics
- Long term plan from university around governance is unclear
- Churn and Change in Athletics / Alumni and it’s impact on us
Alumni Group Category I Event Brainstorming Guide

<table>
<thead>
<tr>
<th>Community Service</th>
<th>Student Recruitment</th>
<th>Networking</th>
<th>Special Interest</th>
<th>Arts</th>
<th>Lifelong Learning</th>
<th>Diversity &amp; Culture</th>
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<tbody>
<tr>
<td>Idea #1:</td>
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# Alumni Group Planning Calendar FY18

<table>
<thead>
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<th>GROUP:</th>
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<table>
<thead>
<tr>
<th>JULY</th>
<th>AUGUST</th>
<th>SEPTEMBER</th>
<th>OCTOBER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start of Fiscal Year</td>
<td>Football Season Begins</td>
<td>Symposium</td>
<td>Homecoming</td>
</tr>
<tr>
<td>Buckeye Book Club</td>
<td>New Buckeyes, New City</td>
<td>Labor Day</td>
<td>BBC Author Visit</td>
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<tr>
<td>(BBC)</td>
<td></td>
<td>National Hispanic-Latino Heritage Month</td>
<td>National Disability Employment Awareness Month</td>
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<thead>
<tr>
<th>NOVEMBER</th>
<th>DECEMBER</th>
<th>JANUARY</th>
<th>FEBRUARY</th>
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<tbody>
<tr>
<td>TTUN Game</td>
<td>Pearl Harbor Remembrance</td>
<td>Buckeye Love</td>
<td>African American History Month</td>
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<tr>
<td>National American-Indian Heritage Month</td>
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<thead>
<tr>
<th>MARCH</th>
<th>APRIL</th>
<th>MAY</th>
<th>JUNE</th>
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<tbody>
<tr>
<td>Women's History Month</td>
<td>Month of Service</td>
<td>Asian / Pacific American Heritage Month</td>
<td>End of Fiscal Year</td>
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<tr>
<td>Irish-American Heritage Month</td>
<td>Spring Game</td>
<td>Jewish American Heritage Month</td>
<td>LGBTQ Pride Month</td>
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<td></td>
<td>Graduation Events</td>
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The Ohio State University Alumni Clubs serve to advance the mission and values of the Alumni Association and the University. Clubs can achieve different levels of engagement which will reflect the Alumni Association’s fiscal support. Below you will find a sample calendar clubs can use to plan and participate in events, fundraising, and meetings.

<table>
<thead>
<tr>
<th>Month</th>
<th>Scarlet ($2000 at end of fiscal year)</th>
<th>Gray ($1000 at end of fiscal year)</th>
<th>Carmen</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>Board Meeting</td>
<td>Board Meeting</td>
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<td></td>
<td>Championship Game Day</td>
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<tr>
<td>February</td>
<td>Scholarship Committee Review</td>
<td>Scholarship Committee Review</td>
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<tr>
<td>March</td>
<td>Game Day (Basketball)</td>
<td>Game Day (Basketball)</td>
<td>Game Day</td>
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<tr>
<td>April</td>
<td>Board Meeting</td>
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<td></td>
<td>5K Race Event (up to $250)</td>
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<tr>
<td>May</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
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<tr>
<td>June</td>
<td>Annual General Body Meeting &amp; Social</td>
<td>Annual General Body Meeting &amp; Social</td>
<td>Annual General Body Meeting</td>
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<tr>
<td>July</td>
<td>Buckeyes After Work (up to $500)</td>
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<tr>
<td>August</td>
<td>Board Meeting</td>
<td></td>
<td>Student Send-Off (up to $250)</td>
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<td></td>
<td>Student Send-Off (up to $250)</td>
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<tr>
<td>September</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Board Meeting</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
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<td>October</td>
<td>Board Meeting</td>
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<td>Game Days</td>
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<td></td>
<td>Game Days (Football)</td>
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<tr>
<td>November</td>
<td>Board Meeting</td>
<td></td>
<td>Game Days</td>
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<td></td>
<td>Game Days</td>
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<tr>
<td>December</td>
<td>Board Meeting</td>
<td></td>
<td>Holiday Party</td>
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<td></td>
<td>Volunteer at Local Soup Kitchen (up to $250)</td>
<td>Volunteer at Local Soup Kitchen (up to $250)</td>
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</tbody>
</table>

Category I Events: Community Service, Student Recruitment & Retention, Networking, Special Interest Events, Cultural/Arts, Lifelong Learning
Category II Events: Social, Family, Sports/Game Watches, Board Meetings
<table>
<thead>
<tr>
<th>Month</th>
<th>Scarlet ($2000 at end of fiscal year)</th>
<th>Gray ($1000 at end of fiscal year)</th>
<th>Carmen</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>Board Meeting &amp; OSU Men's Basketball Tailgate and Game</td>
<td>Board Meeting (up to $50)</td>
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<tr>
<td>February</td>
<td></td>
<td>Buckeye Love Annual Fundraising E-Mail Campaign (up to $250)</td>
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<tr>
<td>March</td>
<td>Wine Tasting Scholarship Fundraiser (up to $250)</td>
<td>Buckeyes &amp; Broadway (up to $250)</td>
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<td>April</td>
<td>Board Meeting</td>
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<td>Graduating Senior Reception (up to $250)</td>
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<tr>
<td>May</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
<td>Guest Speaker Event &amp; Dinner (up to $250)</td>
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<tr>
<td>June</td>
<td>Family Picnic Event at the Columbus Zoo</td>
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<tr>
<td>July</td>
<td>Buckeyes After Work Young Alumni Networking (up to $500)</td>
<td>Board Meeting (up to $50)</td>
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</tr>
<tr>
<td>August</td>
<td>Board Meeting (up to $50)</td>
<td>FYE Book Club Program (up to $250)</td>
<td></td>
</tr>
<tr>
<td>September</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
<td>Attend Club &amp; Society Leadership Symposium</td>
</tr>
<tr>
<td>October</td>
<td>Homecoming Tailgate &amp; Annual Membership Meeting</td>
<td>Homecoming Tailgate &amp; Annual Membership Meeting</td>
<td>Board Meeting</td>
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<tr>
<td>November</td>
<td>Buckeyes &amp; Broadway (up to $250)</td>
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<td>December</td>
<td>Board Meeting</td>
<td>Holiday Party</td>
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</tbody>
</table>

Sample Calendar of Events for The Ohio State Alumni Association Societies
Programming Sessions
While you cannot generalize things to an entire group of people, it is helpful to understand what a certain-aged alumnus might be experiencing at that point in their life to cater to their needs or desires in terms of timing, cost, venue, marketing strategies, and type of program/speaker.

There are ways to work with your REO to get data on where different ages tend to live in your area and make sure to seek feedback and survey your alumni after any programs you have.

Make sure to give detailed information (parking, food options, etc.) prior to the event so that attendees can be prepared and thank attendees upon arrival or afterward (where you can also encourage further engagement).

The Alumni Life Cycle

<table>
<thead>
<tr>
<th>Students</th>
<th>Young Alumni (30 &amp; Under)</th>
<th>30-50</th>
<th>50+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tech savvy</td>
<td>Time of transition (job, family, etc.)</td>
<td>Interest in community or global issues</td>
<td>Connect back to institution</td>
</tr>
<tr>
<td>Very involved</td>
<td>Community/service efforts</td>
<td>Family programming/child-friendly</td>
<td>Invested in family (adult children &amp; grandchildren)</td>
</tr>
<tr>
<td>Financial implications (working/scholarships)</td>
<td>Networking</td>
<td>Cultural Programming &amp; Self-betterment</td>
<td>Personal interactions</td>
</tr>
<tr>
<td>Interested in networking with alumni</td>
<td>Inexpensive but meaningful programming</td>
<td>Academic Focus</td>
<td>Nostalgia</td>
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<td></td>
<td></td>
<td></td>
<td>Impact-focused</td>
</tr>
</tbody>
</table>

Contact: Lauren Luffy
luffy.2@osu.edu
Sarah McLeod
mcleod.79@osu.edu
Lindsey Seitz
seitz.92@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
• Alumni Groups report membership/officer rosters, post-event forms and requests for reimbursements. This presentation walked members through the various forms and processes for how groups submit these.
• The presentation covered some best practices of how to save/collection information to keep the reporting process organized and simplified.
• Reporting timeline: report after 30 days for events using DocuSign. Make sure receipts are itemized and attendance sheets are attached. For board meetings, Scarlet/Gray groups can be reimbursed up to $50/meeting ten times a year.

Contact: Natasha Kanakkanatt
kanakkanatt.1@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
It’s Toolkit Time

• Marketing your alumni group and events is easy when you start with templates in your toolkit.
• Anything missing? Contact Erin Howell!
• We are always coming out with new items for special events like month of service.

Contact: Erin Howell
Howell.491@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
Annual Giving can support groups who are looking to fundraise via online platforms in a few different ways.

Peer to Peer fundraising opportunities are available and more information can be provided by Annual Giving (like a YouCaring or GoFundMe site.)

Traditional Fundraising opportunities are a great way to raise money for your scholarship. Before enacting any fundraiser, please check your state and local laws as there are different laws in different locales about money.

Contact: Maggie Sweeney
Sweeney.186@osu.edu
Kindra Samons
samons.7@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
• Identify easily accessible sources of information on current The Ohio State University facts, stats and updates beyond the athletic field.

• Formulate strategic methods for sharing information with alumni group members, so that Buckeye Nation is further informed on Ohio State news and achievements.

• Present overview of current Ohio State facts, stats and updates to inform alumni group leaders.

Contact: Brendan Braaten
braaten.8@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
The alumni association has a number of tools at your disposal to understand your ever-changing audience and reach out to alumni: Interactive/heat Maps, Surveys, Targeted E-mails to alumni based on their background/industry, Volunteer Meet & Greet Events and Postcards.

- Online tools such as LinkedIn, Alumni Fire, and social media advertising are other methods to communicate and reach out to alumni in your area.
- Alumni Groups should also create succession plans, delegate responsibly, and create a fun volunteer environment to retain board members.

Contact: Brendan Braaten
braaten.8@osu.edu
Leslie Smith
smith.6863@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
Dues or No Dues!

- If you are going to have dues, you need compelling membership benefits.
- OSUAA has templates to help with membership drives and membership benefits pages for your website.
- Advantage to have a donation based dues model, similar to OSUAA, by creating a current use fund.
- Provide your members with an annual budget of how their dues money was spent.

Contact: Craig Little  
little.128@osu.edu

Presentation Link:  
https://groups.alumni.osu.edu/symposium/2017-symposium/
Merchandising Your Brand

- Use your toolkit for your logo and buckeye art.
- Don’t be nervous to order. Work with our approved vendors and they’ll make it easy! Or let us know and we’d be happy to help.
- Find examples on our groups site.

Contact: Erin Howell
Howell.491@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
Resources, Resources, Resources!

- Bookmark on your computer - https://groups.alumni.osu.edu/
- Marketing Resources - https://groups.alumni.osu.edu/best-practices/marketing/
- Blog - https://groups.alumni.osu.edu/category/blog/
- Engagement Strategies - https://groups.alumni.osu.edu/engagement-strategies/
- Tax help – good through May 1, 2018
- Co-branded programming

Contact: Craig Little
little.128@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
Let’s Talk About Events!

• Walkthrough of Category I events, category-by-category, providing examples, ideas, and best practices.
• Provided Event Timeline for planning along with an Event Planning Checklist

Contact: Maggie Sweeney
Sweeney.186@osu.edu

Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
Deep Impact: How Service Builds Community and Strengthens your Membership

• The steps to creating a well-coordinated volunteer opportunity
• Posting your opportunity on Ohio State VolunteerMatch is the preferred way to advertise.
• The Office of Volunteer Relations is here to support you in brainstorming an opportunity, utilizing Ohio State VolunteerMatch and sending you t-shirts for your volunteers.
• Mark your calendars: April is the Month of Service
Integrating Inclusive Practices and Facilitating Meaningful Events on Diversity

- Brainstorm ways to expand engagement of alumni in meaningful and impactful cultural or diversity programming regionally.
- Understanding Social identities, diversity, culture, and inclusion to expand alumni involvement and programming best practices.
- Recognizing diversity and inclusion as a group value and ways to demonstrate this in all areas of alumni engagement.

Social Identity Wheel

- Diversity Programming that is not one dimensional and beyond the Black/White or ethnic conversation
- Ex. Special Play for Buckeyes
- Ex. Networking → For those who are management or owners have a HR professional or diversity consultant come in to talk about hiring practices that are inclusive or how to build a culture of inclusion.
- Ex. Local Matters → Food Justice → SNAP
- Ex. Poverty Simulation attend as a group

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Presentation Link:
https://groups.alumni.osu.edu/symposium/2017-symposium/
WEBINAR CALENDAR

SEPTEMBER 27
12 p.m. EST / 8 p.m. EST
Symposium Recap and High Points to Remember

OCTOBER 18
12 p.m. EST / 8 p.m. EST
Alumni Scholars Program for Clubs

NOVEMBER 9
12 p.m. EST / 8 p.m. EST
Category I Events & You!

JANUARY 17
12 p.m. EST / 8 p.m. EST
Speaker’s List Update

FEBRUARY 7
12 p.m. EST / 8 p.m. EST
Month of Service and Utilizing VolunteerMatch

MARCH 21
12 p.m. EST / 8 p.m. EST
Creating a Mentoring Program

APRIL 4
12 p.m. EST / 8 p.m. EST
Maximizing the Remainder of the Fiscal Year

MAY 9
12 p.m. EST / 8 p.m. EST
Early Engagement

JUNE TBD
12 p.m. EST / 8 p.m. EST
Officer Training 1 (President / Vice President)

JUNE TBD
12 p.m. EST / 8 p.m. EST
Officer Training 2 (Treasurer / Secretary)
Thank you for all that you do!

Save the Date for next year’s Symposium: Sept. 7, 2018!
Q & A